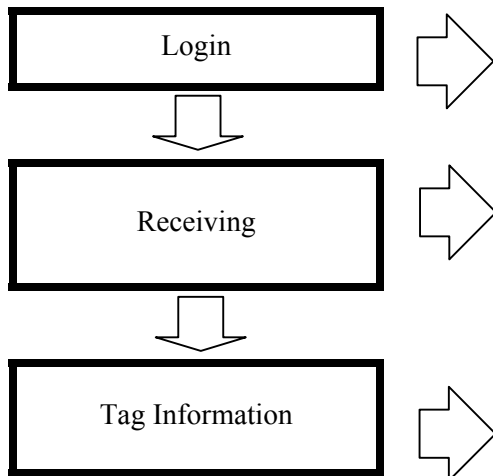
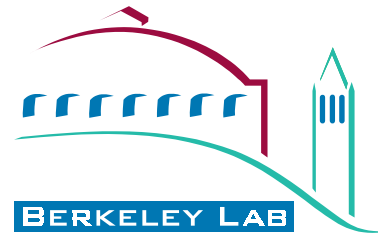
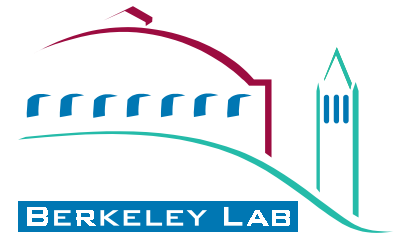


Receive with Purchase Orders



1. [Login into the PeopleSoft system](#) and prepare to receive shipments.
2. With these panels you will be able to [receive shipments](#) into the PeopleSoft receiving system.
3. On receipts requiring the user to include [tag information](#).

Receive with Purchase Orders

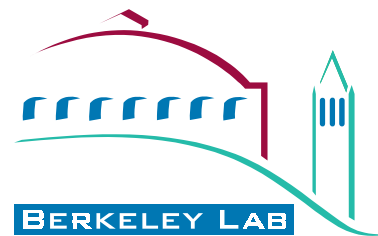


Step 1: Login

- Launch the PeopleSoft Signon from the Novel Application launcher.
 - Connection type "Oracle" (Defaulted)
 - Database Name "FMSPRD" (Defaulted)
 - Enter your login name. (UPPERCASE only)
- Password is left blank.
- Click "OK"

A screenshot of the PeopleSoft Signon dialog box. The title bar says "PeopleSoft Signon". Inside, the PeopleSoft logo is on the left, and "PeopleTools 7.62 Copyright (c) 1988-1999 PeopleSoft, Inc. All rights reserved." is on the right. Below this, it says "Enter Signon Information Below:". There are four input fields: "Connection Type:" with a dropdown menu showing "Oracle", "Database Name:" with a text box containing "FMSPRD", "Operator ID:" with a text box containing "JPSPEROS", and "Password:" with an empty text box. At the bottom are three buttons: "OK", "Set Password...", and "Cancel".

Receive with Purchase Orders



Step 2: Receipt of Purchase Orders

For receipts, you are only required to select the PO lines you are receiving and record receipt quantities. The information on the Receipt Items panel informs you about the information required of each receipt.

Selecting the PO Item Lines

The first step in the receipt of items is to find the PO on which it was ordered.

- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Use
- ⇒ Receive with Purchase Order
- ⇒ Receipt Items
- ⇒ Add

The Add - Receive with Purchase order dialog box displays.

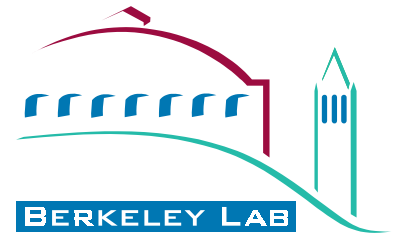
The dialog box is titled "Add -- Receive with Purchase Order". It has a "Business Unit:" label next to a dropdown menu currently showing "LBNL". Below that is a "Receiver ID Number:" label next to a text input field containing "NEXT". To the right of these fields are two buttons: "OK" and "Cancel".

The business unit of LBNL will default into the field.

In the **Receiver ID Number** field, accept the default of **NEXT**.

Click OK.

Receive with Purchase Orders



The Receipt Items panel displays.

A screenshot of a software window titled "Manage Shipments - Use - Receive with Purchase Order". The window has a menu bar (File, Edit, View, Go, Favorites, Use, Process, Inquire, Report, Help) and a toolbar with various icons. Below the toolbar is a tabbed interface with tabs for "Receipt Items", "Item List", "Assets", "Accounting", "Putaway", "Serialize", "Receipt Status", and "Status Detail". The "Receipt Items" tab is active, showing a form with fields for "Unit: LBNL", "Recv No: NEXT", "Ship To:", "Recv Date: 04/23/2002", "Vendor:", "Ship No:", "Bill of Lading:", "Pack Slip:", and "Unld Port:". A small icon of a document with a red 'X' is circled in the bottom left corner of the form area, with a line pointing to it from the text below.

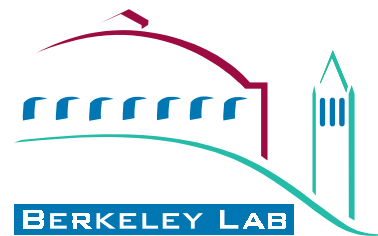
You use this panel to enter receiving information. The fields you need, and other information appears after you select the PO number corresponding to the shipment you are receiving.

Complete the following elements.

| PANEL ELEMENT | DESCRIPTION | TRAINING EXAMPLE |
|----------------|---------------------------------------|------------------|
| Recv Date | Receiving Date | |
| Bill of Lading | Used to enter the packing slip number | |
| Unld Port | Not used by LBNL | |

Click on the **Select Purchase Order**  button.

Receive with Purchase Orders



You use this dialog box to search for the PO that corresponds to the shipment you are receiving. If you know the PO number, the search is easy; you only need to enter:

- Purchase Order Number
- Business Unit

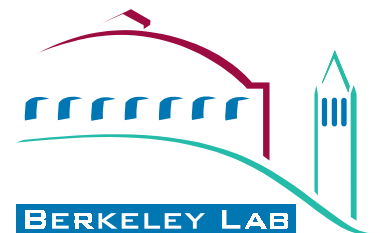
If you do not know the PO number, you can search by:

- Ship to
- Day +/-
- Start Due Date
- End Date
- Item ID
- (Vendor) Short Name
- Ship Via


Complete the following panel elements

| PANEL ELEMENT | DESCRIPTION | TRAINING EXAMPLE |
|------------------|--|------------------------------|
| PO Business Unit | Business Unit that created the PO - required field | Select CHP01 |
| Purchase Order | Purchase order number - optional field. | Type the specified PO number |

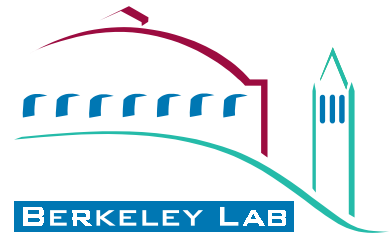
Receive with Purchase Orders



| PANEL ELEMENT | DESCRIPTION | TRAINING EXAMPLE |
|------------------|---|------------------------|
| Ship to | Receiving areas for Children's Hospital | Leave Blank |
| Days +/- Today | Number of days before and after today for which the system will display the PO's - optional field | Leave Blank |
| Start Due Date | Starting date for the search - defaults base on the value selected in the Days +/- field | Leave Blank |
| End Date | Ending date for the search - defaults based on the value selected in the Days +/- field. | Leave Blank |
| Item ID | ID number of Item being received - optional field | Leave Blank |
| ShortName | Shortened name of vendor from whom item was purchased - optional field. | Leave Blank |
| Ship Via | Shipment method - optional field | Leave Blank |
| OpenSched | Narrows search to only PO's that have not been received | Accept the default |
| Default Accept | Not used by LBNL | N/A |
| No Order Qty | The copy function will not transfer order quantities to the receipt. All receipt quantities will need to be entered manually. | Radio button activated |
| Ordered | To bring over order quantities as the received quantity, this will default in the purchase order quantity irregardless of any prior receipt quantity. | Not Activated |
| PO Remaining Qty | Dimmed; default can't be changed; causes received quantity to default from the open PO quantity | Not activated |

After entering the search criteria, click the **Fetch PO Schedule**  button.


Receive with Purchase Orders




The dialog box displays a list of Purchase Order lines meeting your search criteria.

The "Pick Purchase Order" dialog box has a title bar with a close button. It contains several input fields: "PO Business Unit" (LBNL), "Purchase Order" (empty), "Ship To" (069-0150), "Days +/- Today" (empty), "Start Due Date" (empty), "End Date" (empty), "Item ID" (empty with a dropdown arrow), "ShortName" (KEITHPACE-001 with a dropdown arrow), and "Ship Via" (empty). Below these are five radio buttons: "OpenSched" (checked), "Default Accept", "No Order Qty", "Ordered Qty", and "PO Remaining Qty". The main area is a table with columns: "PO Unit", "Purchase Order", "Line Number", "Long Description", and "Due Date". It lists five items from LBNL. To the right of the table is a vertical scroll bar and a column of "Details" buttons (magnifying glass icons). At the bottom are four icons: a folder, a list, a refresh, and a document.

The dialog box displays only five lines at one time. If your search yields more lines than can fit on the panel, use the scroll bar and view additional lines. For each line, the panel displays its business unit, PO number, line number, a description of the item, and its due date.


A **Details**  button displays to the right of each line. If you want to view, the details of a line click its Details button.

A check box displays to the left of each line. When you identify the PO and line for which you want to enter receiving information, select its check box. You can select as many lines from the same PO as you want.

Click the **Fetch PO Schedules**  button to retrieve the Purchase Orders that match your selection criteria. The lines that satisfy the selection criteria you've entered will display in the selection panel.

Press the **Select All PO Schedules**  button to select all of the Purchase Orders at once.

Press the **Unselect All PO Schedules**  button to deselect all of the Purchase Orders at once.

To refine your search, click the **More Search**  button.

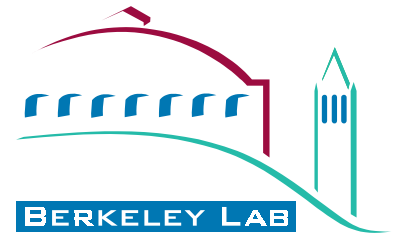
After you have selected the lines for which you want to enter receiving data, click OK, then enter the receiving data, click **OK**, then enter the receiving data on the **Receipt Items** panel

WARNING: Do not use one receiver for multiple PO's: However, you can create multiple receivers for one PO number.

Select the check boxes of the lines you want to receive.

Click **OK**.

Receive with Purchase Orders



The Receipt Items panel redisplay.

Recording and Adjusting Receipt Quantities

The screenshot shows a software window titled "Manage Shipments - Use - Receive with Purchase Order". It has a menu bar (File, Edit, View, Go, Favorites, Use, Process, Inquire, Report, Help) and a toolbar with various icons. Below the toolbar is a tabbed interface with "Receipt Items" selected. The main area contains several input fields: "Unit: LBNL", "Recv No: NEXT", "Ship To: 069-0150", "Recv Date: 04/23/2002", "Vendor: 3M DQY5505", "Ship No:", "Bill of Lading:", "Pack Slip:", "Unld Port:", "Cat Id: Clothing", "Hazard" checkbox, "Test Fixture", "Recv UOM: EA", "PO Unit: LBNL", "PO: 0000100052", "Line: 1", "Receipt Qty: 4.0000", "Inspect: N", "Asset: Y", "Location: 001-0101", and "Requester:". At the bottom is a table with columns: "Due Date", "Ship To", "Sched NRecv Qty", "Accept Qty", "Insp Qty", and "PK Slip No". The first row of the table shows: "04/04/2002", "069-0150", "1", "4.0000", "4.0000", and "0.0000". There are also "Add" and "Receipt Items" buttons at the bottom right.

When the Receipt Items panel reappears, it displays information for the lines you selected on the Pick Purchase Order dialog box. New fields that allow you to record the received and accepted quantities, display on the panel.

In the following fields, key in the received quantity and the accepted quantity.

Complete the following panel elements:

| PANEL ELEMENT | DESCRIPTION | TRAINING EXAMPLE |
|---------------|-------------------|------------------|
| Recv Qty | Quantity Received | |
| Accept Qty | Quantity Accepted | |

In the Pack Slip field, type the packing slip number, then press **Tab**.

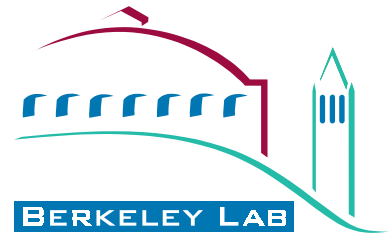
The system copies the packing slip number to each line of the receipt.

Click the **Save**  button.

The system saves your data and assigns a Receiver ID Number to your receipt.

Click the **Cancel**  button.

Receive with Purchase Orders



Viewing comments on PO lines (Optional)

To view the PO line comments, click the **PO Comments** button.

The "Manage Shipments - Use - Receive with Purchase Order" dialog box is shown. It contains fields for Unit (LBNL), Recv No (NEXT), Ship To (069-0150), Recv Date (04/23/2002), Vendor (3M DQY5505), Ship No, Bill of Lading, Pack Slip, and Unld Port. Below these are fields for Cat Id (Clothing), Hazard, Test Fixture, Recv UOM (EA), PO Unit (LBNL), PO (0000100052), Line (1), Receipt Qty (4.0000), Inspect (N), Asset (Y), Location (001-0101), and Requester. A table at the bottom shows Due Date, Ship To, Sched N, Recv Qty, Accept Qty, Insp Qty, and PK Slip No. The Recv Qty, Accept Qty, and Insp Qty fields are highlighted with a red circle, and an arrow points to the PO Comments button icon in the bottom right corner of the dialog box.

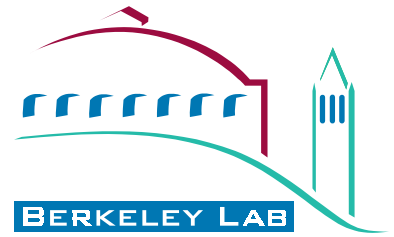
The Purchasing Order Comments dialog box displays.

The "Purchase Order Comments" dialog box is shown. It contains fields for PO Unit (LBNL), PO (0000000012), and Line. There is a checkbox for "Send to Vendor" and a large text area for "Comment Text". The dialog box has OK and Cancel buttons in the top right corner.

Review any comments.

Click **OK**.

Receive with Purchase Orders




Step 3: Entering Tag Information

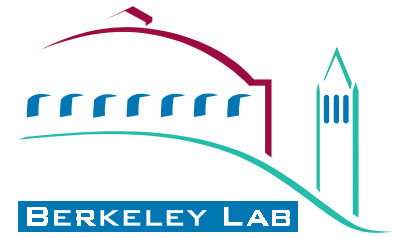
During the receipt of items that have a value of >\$5000 or items of “High Sensitivity” they will be required to be tagged by the receiving department. This information will need to be added to the receipt by way of the Assets panel. The number of rows generated is equal to the distribution quantity converted to the standard unit of measure.

Since the distribution quantity is driven from the accepted quantity rows will be generated until an accepted quantity is entered.

Receive with PO – Tag’s

Click on the **Display Asset Data**  button to activate the asset information fields for the item being received.

Receive with Purchase Orders



The Tag information field will open for data input.

The screenshot shows a software window titled "Manage Shipments - Use - Receive with Purchase Order". The window has a menu bar (File, Edit, View, Go, Favorites, Use, Process, Inquire, Report, Help) and a toolbar with various icons. Below the toolbar is a tabbed interface with tabs for "Receipt Items", "Item List", "Assets", "Accounting", "Putaway", "Serialize", "Receipt Status", and "Status Detail". The "Item List" tab is active, showing a table with columns for "Recv Line", "Item", and "Test Fixture". The first row shows "1", "Test Fixture", and an empty field. Below the table is a form for "AM Unit: LBNL", "Status: O", "Quantity: 4.0000", and "Tag Number: 123456789". There is a "Profile ID: CAPITAL" field with a red 'X' icon, a "Serial ID:" field, and an "Asset ID: NEXT" field. Below these are "Custodian:", "Location: 001-0101", "Dist Seq: 1", "Model: X243", and "Manufacturer: ABC Mfg.". At the bottom, there is a summary section with "Asset Qty: 4.0000" and "Total Asset Qty: 4.0000". The window also has a status bar at the bottom with "Assets" and "Add" buttons.

The receiving user will be able to add the Tag Number, Custodian, Tag Number, and Manufacturer to the panel. Once saved the information will be attached to this receiver for tracking purposes.